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# PURCHASING USER MANUAL

## CREATING AN ADDRESS LIST OF BILL TO, SHIP TO, AND AGENCY ADDRESSES FOR THE PURCHASE ORDER FORM

### INTRODUCTION

Administrators can create an address list for billing and shipping addresses as well as the address for their agency that will print on the purchase order. These addresses can then be used when users create line items for their requisitions or purchase orders.

The **Address** screen is comprised of the list of addresses that you have saved (if any) and a form to add a new address or update an existing one.

Figure 1 - Address screen

The screenshot shows the 'Address Maintenance' screen. At the top, there are tabs for 'User Maint', 'Agency', 'Address' (selected), and 'PO Notes'. Below the tabs, there's a title 'Address Maintenance' and radio buttons for 'Active', 'Non Active', and 'All Addr'. A table lists existing addresses with columns: Name, Group, Description, Act, Ship, Bill, Contact, and Address. Below the table, there's a form to add a new address with fields for Name, Group, Contact, Address, City, State, Zip, Phone, ext, Fax, and Desc. There are also checkboxes for 'Active Address', 'Default Shipping', 'PO Form Address', and 'Default Billing'.

Name	Group	Description	Act	Ship	Bill	Contact	Address
Select College Idaho	Southern Idaho	College of Southern Idaho	✓			Attn: Claudeen W Campbell	315 Falls Avenue, P
Select Dept Admin	Management	Main Boise Office	✓			Attn: Rebecca K Thomason	650 West State roo
Select Forensic Serv	Region 5 Lab	Idaho State Forensic Services	✓			Attn: Supervisor Donald Peck	209 E Lewis
Select Forensic Service	Region 3 Lab	Idaho State Forensic Services	✓	✓	✓	Latent Fingerprint Supr Randy Meade	700 S Stratford Driv

Once addresses are added, you can filter the list of addresses by selecting **Active**, **Non-Active**, or **All Addr**. You can also click the column headers to sort the list.

### TO ADD A NEW ADDRESS

1. Complete the address fields as needed. The required fields are **Address**, **City**, **State**, and **Zip**. The **Phone** number must be entered without a hyphen (5552222).
2. Enter a **Group** name and **Desc** (description). These are used to organize your addresses on the **Address** screen and so that users can sort from the list and select the address they need when creating requisitions or purchase orders.

3. Be sure the **Active Address** check box is checked.
4. Check either **Default Shipping** or **Default Billing**, or **PO Form Address**. (The **PO Form Address** will be your agency's address printed on the purchase order.)
5. Click **Add New Address**.
6. To add another address, click **Cancel** (this will clear the form but not cancel the address just added).

All three addresses will be printed on a purchase order:

Figure 2 - Purchase order form

## TO EDIT AN ADDRESS

1. Click **Select** next to an address in the address list.
2. Edit the address as needed.
3. Click **Update Address**.

## TO SELECT AN ADDRESS FOR A REQUISITION OR PURCHASE ORDER

The address list is available to users when they create a requisition or purchase order. Users will click the line item **Menu** and select either **Edit Ship-To Address** or **Edit Bill-To Address**. Users can then select an address to apply to one or all line items in the requisition or purchase order.

Figure 3 - Select an address